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ABSTRACT

This manual is designed to provide trainers with detailed information on designing and implementing workshops concerning lifelong learning. The handbook is intended for trainers working as educational, staff development, and organizational development consultants in such organizations as human service agencies, business and industry, self-help groups, libraries and museums, religious institutions, and continuing education institutions. The manual first provides a brief discussion of the lifelong learning concept. The second section contains a description of the Lifelong Learning Scale Instrument, and this is followed by an explanation of the basic design of the workshop modules contained in this guide. Each module is aimed at objectives that differ as to situational and target population contexts. These workshop modules include activities for single organization target populations; for cross-agency target groups; for inter-agency conflict management; and for research and teaching usage. A final section provides trainers with an indepth explanation of the descriptors used at the two ends of the formal-nonformal continuum of the 11 variables of the lifelong learning scale. A bibliography of relevant sources, and materials used in the modules, are appended. (KC)

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Lifelong Learning Manual:

Training for Effective Education in Organizations

Community Education Resource Center
School of Education
University of Massachusetts
at Amherst

Michael Frith and Horace B. Reed, Editors

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* * *

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TABLE OF CONTENTS

INTRODUCTION. 1

Manual Format. 1

THE LIFELONG LEARNING CONCEPT 3

THE LIFELONG LEARNING SCALE 5

Purposes And Uses. 5
Sample Of The Scale. 6
Description Of The Scale 8
Suggestions On The Use Of The Scale. 8

BASIC DESIGN OF WORKSHOP MODULES. 11

Workshop Assumptions On Learning And Facilitating. 11
Underlying Framework Of The Module Design. 11

DISCOVERING EDUCATION: SINGLE AGENCY MODULE #1 19

DEFINING ORGANIZATIONAL LEARNING: SINGLE AGENCY MODULE #2. 23

PREPARING FOR CHANGE: SINGLE AGENCY MODULE #3. 25

SYNERGY FOR EDUCATIONAL SURVIVAL: CROSS-AGENCY LINKAGE MODULE. 27

A DIFFERENTIATION APPROACH:
INTER-AGENCY CONFLICT MANAGEMENT MODULE 33

TEACHING-LEARNING MODULE ON LIFELONG LEARNING 37

RESEARCH ON LIFELONG LEARNING MODULE. 39

SCALE DESCRIPTOR EXPLICATION. 41

BIBLIOGRAPHY. 49

APPENDICES. 55

INTRODUCTION

The purpose of this manual is to provide trainers with detailed information on designing and implementing workshops concerning lifelong learning. The handbook is intended for trainers working as educational, staff development, and organizational development consultants in any organization that has significant educational functions. Thus, these workshop activities are targeted for participants who are involved in such organizations as human service agencies, business and industry, self-help groups, libraries and museums, labor groups, religious institutions, service and fraternal groups, state and federal government agencies, continuing education institutions. Faculty in higher education may find the manual useful in their community and adult education seminars.

Manual Format

The manual first provides a brief discussion of the lifelong learning concept. Second is a description of the Lifelong Learning Scale Instrument. Next is an explanation of the basic design of the workshop modules. Then is presented detailed designs and implementing suggestions for a variety of workshop modules. Each module is aimed at objectives that differ as to situational and target population contexts. These workshop modules include activities for single organization target populations; activities for across-agency target groups; activities for inter-agency conflict management; and activities for research and teaching usage.

A final section provides trainers with an in-depth explanation of the descriptors used at the two ends of the formal-nonformal continuum of the 11-scale variables. A bibliography of relevant sources, and materials used in the modules, is appended.

THE LIFELONG LEARNING CONCEPT

The interest in lifelong learning derives from several sources. There is the conviction that learning is not only for youth, but continues throughout the life span. Related is the growing recognition that significant learning opportunities are available through many out-of-school groups, agencies, and organizations, in addition to formal schooling institutions. Another compelling force is the need for working adults to cope with the rapidly changing demands of the work place of modern societies. These demands require the learning of new skills, attitudes, and information. Another factor is the shortened work week for many adults, with an increasing range of educational technology that makes it feasible for adults to have access to innovative and convenient ways of achieving new learnings. All these factors combine to provide a powerful and pervasive set of motivating forces that generate an increasing interest in the lifelong learning concept. The modules in this manual are designed to help agencies and facilitators increase their intra- and interagency effectiveness in delivering lifelong learning. One central learning resource for the modules is the Lifelong Learning Scale.

THE LIFELONG LEARNING SCALE

Purposes And Uses

Analysis of educational settings using the Lifelong Learning Scale (see next section) generates data on 11 variables along continua that go from more formal to less formal. It may be used with a wide variety of settings, including both the formal school and a large array of out-of-school settings. This data may be useful in several ways. For a given setting, marked differences among the educational variables may indicate undesirable contradictions, perhaps between means and ends. Comparisons between educational settings, both as to similarities and differences, may offer clues for those interested in promoting connections or collaboration between settings. Those designing new settings, or planning modifications of existing ones, may find the scale a helpful check on their design. Agencies and organizations that may not perceive that they have significant educational functions, may learn more about their operations through application of the scale to their situation. Those concerned with staff development for various agencies may find this training handbook useful in enhancing learner's perceptions of what education includes and who sponsors it. Differences in perceptions among the staff of an agency may provide useful information for specific staff development activities.

The modules presented here may be used on their own, or in conjunction with a more inclusive framework of learning objectives. There is no necessary sequence to the modules; trainers may find it useful to combine and borrow objectives and activities across the modules, to fit their specific workshop design.

Some of the individual and group issues that can be attended to by the modules include:

- Team building towards collaborating
- Trust building through information sharing
- Encouraging reflection in preparation for change
- Uncovering underlying assumptions about learning and education
- Clearing up misperceptions between subgroups or within groups
- Identifying potential barriers to cooperation between organizations
- Suggesting agenda items for agency staff development
- Providing research approaches on lifelong learning

THE LIFELONG LEARNING SCALE

EDUCATIONAL VARIABLES	DESCRIPTORS More Formal / More Structured / More Abstract / More Objective ... Less Formal / More Flexible / More Concrete / More Subjective	N/A; COMMENTS
Objectives	1 2 3 4 5 Building and conservation of knowledge More cognitive More delayed Applying knowledge for personal and community development More psychological and physical More immediate	
Content And Sequence	1 2 3 4 5 Abstract; symbol systems Logically organized Scholarly disciplines Predictable sequence Requirements and prerequisites Concrete; experiential Psychologically organized Interdisciplinary Sequence less ordered Few requirements	
Time Units	1 2 3 4 5 Long term Full time Tighly scheduled Preset time periods Short term Part time Flexible schedule Situational time periods	
Learners	1 2 3 4 5 Age selective Section criteria predictable and more precise Age inclusive Selection criteria less predictable and more general	
Staff	1 2 3 4 5 Professionals A major life aim Highly trained Distinct roles Credentials Lay oriented Ancillary life aim Short term training Less distinct roles Noncredentialed	
Teaching-Learning Approaches	1 2 3 4 5 Teacher more directive Teacher more responsible Learner is receiver Teacher more facilitating, advising, Learner more responsible Learner more active	

(CONTINUED ON NEXT PAGE)

THE LIFELONG LEARNING SCALE (Page Two)

EDUCATIONAL VARIABLES	DESCRIPTORS More Formal / More Structured / More Abstract / More Objective — Less Formal / More Flexible / More Concrete / More Subjective	N/A; COMMENTS
Rewards And Evaluation	1 2 3 4 5 Extrinsic rewards More competitive Evaluation of knowing Product oriented Quantitative evaluation Instrinsic rewards More cooperative Evaluation of performance Process oriented Qualitative evaluation	
Curriculum Materials And Resources	1 2 3 4 5 Complex technology Commercial production Written and spoken media Simpler technology Local production Multi-media	
Financial Resources	1 2 3 4 5 Larger expenditures per learner Long term investment Mostly government sponsored More elaborate accounting procedures Less flexible allocations Smaller expenditures per learner Short term investment Varied sponsors Less elaborate accounting procedures More flexible allocations	
Building Resources	1 2 3 4 5 Major permanent constructions Specific, set spaces High maintenance cost Less often user constructed Minor temporary constructions Flexible spaces Less maintenance cost More often user constructed	
Power, Control And Administration	1 2 3 4 5 Adherence to rules, forms, and routines More hierarchical Power partly function of status and resources Decision making by role Workers in established organizations Leaders viewed as managers More personal More horizontal Power largely function of competency Decision making shared Workers less organized Leaders viewed as coordinators	

Description Of The Scale

The Scale lists 11 educational variables along a vertical column. Each variable has a scale made up of a continuum, with general descriptors as follows:

Left	Right
More Formal	Less Formal
Structured	Flexible
Abstract	Concrete
Objective	Subjective

The formal end is marked with the number "1" and the less formal end with the number "5"; graduation points lie in between. As refinements to the more general descriptions of the continua, each variable has specific descriptors that help identify where on the continuum a given setting falls. A detailed explication of these descriptors is included at the end of the Manual.

Given information concerning an educational agency, it is possible to estimate on each of the continua of the 11 variables, which descriptors are most appropriate. With a specific educational organization in mind, the rater circles the appropriate number (1 to 5) on the formal-nonformal continuum of each educational variable. A vertical profile is generated by connecting the points on the 11 continua, thus providing a unique profile of that agency.

It should be pointed out that using the entire Scale can be a lengthy process. Depending upon the workshop objectives and time frame, a shortened version can be constructed using the more provocative or relevant variables (see page 22 for a sample shortened version).

Suggestions On The Use Of The Scale

The specific descriptors on the continuum for each variable are much more fully explained in the section entitled, "Explication Of The Scale Descriptors." When first using the Scale in the analysis of an educational setting, the user may find it helpful to refer to that section.

Users should be aware of a number of factors in applying this Scale. In some instances, the information available on a given setting may be sparse. Some agencies may be very complex; this may result in conflicting data unless subsets are established with separate profiles for each subset. There may be cases which do not significantly include one or more of the 11 variables, or may not explicitly refer to some of the variables except by inference and implication.

It is common for settings to have a profile that moves back and forth (more to less formal) as one goes down the vertical column of the 11 continua. This does not necessarily imply contradictions or inconsistencies. There may be rationales for such patterns.

The selection of these 11 variables, and their specific descriptors, while not arbitrary, certainly is not definitive. One of the cautions to keep in mind is that the Scale focuses on each variable as if it could be assessed in isolation of the other variables. In using the Scale, it is more realistic to see some variables as interacting with others, when estimating one's judgments. This is most evident in the way the objectives variable may influence the content variable and how these two may influence many of the others.

Finally, many very different educational approaches can be equally sound. Data highlighted by the Scale may be useful in making an overall judgment about an approach, but the data needs to be used along with other information, such as knowledge about values, assumptions and situations which must be obtained through other means.

BASIC DESIGN OF WORKSHOP MODULES

Workshop Assumptions On Learning And Facilitating

The structure of the workshops presented in the Manual is based on several assumptions. The modules are intended largely for adult participants involved in out-of-school settings. Adult learning and its facilitation by trainers is significantly different from youth learning and teaching in school settings. The learning gained during the years of an adult's daily life experiences create distinctive needs, attitudes, problems, life-styles and expectations. The implications for participants and trainers in the design and implementation of the Manual workshops are: (a) an emphasis on first-hand experiences, both as to frequency and variety; (b) considerable need for learner independence; (c) a concern that time not be wasted and concern about financial expenses; (d) physical idiosyncracies among the target population; (e) an urgency to address personal and social problems each adult brings to a setting; (f) the many individual preoccupations adults bring to a learning situation; (g) fairly set ways adults have of relating to others; (h) fairly ingrained beliefs; (i) stereotyped responses to education from earlier schooling; (j) many resources to share with others.

Many of these implications for out-of-school workshop designs and implementations are relevant to youth target populations, as well as for adults.

Underlying Framework Of The Module Designs

The training modules in this Manual reflect the assumptions about learning and facilitating. What follows is an introduction to the underlying framework of the module design so that trainers interested in experiential training will become more conscious of the learning process and be better able to facilitate the sessions. The modules have been keyed to the major checkpoints in the basic design format so that trainers will be able to check the completion of each stage before moving the learning group on.

The modules are organized using the following format:

Getting Ready
- Title Of Module
- Broad Goal Of Module
- Module Objectives
- Audience
- Time Estimate
- Physical Setting
- Materials Needed

Working With Participants

- Implementation Of Activities:
  - Climate setting
  - Goals and objectives sharing
  - Participant activities: The Experiential Cycle:
    a. Experience
    b. Processing of shared experience
    c. Generalize
    d. Apply
  - Closure

The Experiential Cycle

At the core of the module design is the "Experiential Cycle" of learning. There are several versions of this powerful model - the one we use is simple, easy to memorize and thus likely to be used.

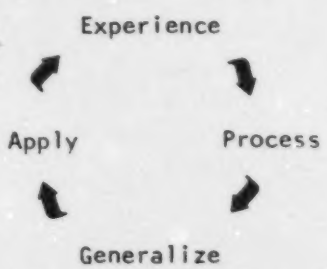

Figure 1.

THE EXPERIENTIAL CYCLE

Individuals in a group (as well as the group itself) effectively internalize learnings based on a shared experience if they thoroughly examine what happened (process), discuss the broader implications (generalize) and plan to incorporate the learning into an actual "back home" activity (apply). This core phase of the training will be discussed in more detail in its context within the overall design model.

Working With Participants

The experiential cycle is the major implementation phase in a four-stage training model. The other three phases introduce and bring closure to the central learning activity. These are the stages keyed into the training module process sheets:

I. Climate Setting

II. Goal Sharing

III. Experiential Cycle

a. Experience
b. Process
c. Generalize
d. Apply

IV. Closure

I. Climate setting. The main objectives for the trainer in this opening phase are to focus people's attention and to set an appropriate learning climate. This is also the time to provide a linkage to any earlier sessions, allow the participants to get to know each other and to whet their appetite for the topic. A lecturer often opens with a joke to focus the audience's attention with an off-beat analysis of the topic. Trainers have a wider range of climate-setting options to draw from.

Most people arrive at a meeting with something to say. Ice-breakers and introduction activities (see the Appendix) provide them with a platform to get it off their chests and to focus their attention on business. Even when a familiar group is reconvening after a lunch break, the trainer should watch for any needs people have to share experiences with the amazing Baked Alaska or the dash through a blizzard. It is hard to get on with the training with unfinished business hanging in the background. It is also a good practice to pass around a sign-up sheet for the names and addresses of the participants to be copied and distributed to them.

Climate-Setting Evaluation Questions:

1. Have I brought everyone into the room emotionally and mentally, as well as bodily?

2. Has unfinished business been dealt with?

3. Have I provided a clear linkage to any other sessions?

4. Have I enticed them into the learning topic?

5. Is the atmosphere conducive to learning?

II. Goal sharing. With any luck, the trainer will be delivering the workshop secure in the knowledge that the learning goals fit the group's needs. Sometimes this security is misplaced or absent, however. An example would be a workshop design put together for the conference of an unfamiliar association. Another all-too-common situation is the one in

which the trainer has been asked to provide specific training as a solution to a vaguely-defined problem. This is the stage in the training session to check out your assumptions and the group's expectations and to introduce the goals. It should be viewed as a mini needs assessment to provide specific data about the trainees that may influence the emphasis of the training and to identify resources within the group.

A direct approach to this last-minute check is to encourage people to share what they know about the topic. A brainstormed list of associations generated by the workshop title or topic will often yield a rich body of data specific to the group that can be woven into the session. One or two open-ended questions can be used to stimulate a topical discussion.

What happens when it becomes obvious that the planned session will not meet the needs of the group? The trainer has the option of making it relevant, changing the topic or leaving. Circumstances will dictate the most appropriate action, but the first option should be considered to be generally the most viable. One of the most common reasons for some individuals to feel that the training isn't for them is that they see themselves as experts who are not likely to learn anything new. These experts are invaluable members of an interactive learning group, so it's generally best to try and hold on to all the participants.

When the goals are discussed, the trainer must be explicit about the way in which they are relevant to the needs and resources of the group. This is where the brainstormed list of impressions is most useful. Make sure the goals are clear to everyone. Check their relevance and be open to re-wording or adding to them. This helps trainees "buy into" and reach agreement on the goals.

Goal Sharing Evaluation Questions:

1. Has the relevance of the topic been established?

2. Have I begun to identify the group's resources?

3. Have I collected data that will help make the training relate to specific needs in the group?

4. Have the goals been clearly tied into the needs identified by the participants?

5. Has everyone "bought into" the goals?

6. Does the title of the workshop reflect the content?

III. The experiential cycle. Having cultivated an appropriate climate and established the relevance of the learning goals, the trainer is ready to introduce the core of the training with the first phase in the experiential cycle.

a. Experience. The shared experience is structured to maximize interaction. Classic structured experiences are role-plays, case studies and simulations. These highly interactive techniques are most useful when: hypothetical cases will reduce the threat of real life situations; roles rather than individuals or organizations need to be examined; and interpersonal skills and new behaviors are to be developed. A word of caution: The more interactive and affective the role-play, the more difficult it is to get players out of role and on to new business.

When, as is often the case with Lifelong Learning Scale workshops, the real-life situations of the participants are linked together to form the shared experience, high quality interaction must be fostered. This is the main reason for keeping small groups to less than five or six members. Providing sufficient air time for each participant in a larger group is impossible without clamping down on spontaneous conversation and creating boredom. Even when working with small groups, the facilitators should make sure that each member is drawn into the transaction.

While instructing groups or individuals to do independent work that is to be shared out, the trainer should:

1. Give crystal-clear task instructions, preferably written
2. Describe the product to be created
3. Set a time limit
4. Describe the report-out procedure

Once the groups or individuals have been set to task, the trainer should be available to answer individualized questions, without interrupting the whole group.

b. Process. Processing is the replaying or group sharing of an experience. Its purpose is to compare and contrast as rich a variety of different perceptions of the experience as possible and to gain general agreement as to what happened. The key to successful processing is the trainer's ability to draw all participants out on their feelings as well as their perceptions. The following is a selection of questions that will encourage processing.

Processing Probes:

1. What was. . .like for you?
2. How did you feel when. . .happened?
3. How did others feel about. . .? (Compare and contrast.)
4. That's interesting! Can you say any more about that?

5. What did you see happening when. . .?

6. How did you feel while you were. . .?

7. What do you think the consequences of. . .were?

c. Generalize. The transition from processing into the generalizing phase should be made as distinct as possible. A clear transition is only possible when processing has been thoroughly completed. Allow adequate time in the design for each participant to contribute to the group view of the experience before moving on.

The purpose of generalizing is to explore what was learned from the experience - to abstract generalizable learnings from it. Two pitfalls for the trainer are: allowing the discussion of the whole group to follow the natural tendency of one or two individuals to draw general conclusions before others have finished processing what happened; and not announcing the transition overtly. The ability to steer the discussion without appearing to control it is a useful skill. These questions can be used to stimulate the generalization phase.

Generalizing Probes:

1. What did you (each individual) learn from this?

2. What was the most satisfying enlightening part?

3. What was the most difficult part?

4. How would you do it if you could do it again?

5. What was missing from the experience?

6. If. . .(another individual or organization) where here, would they view it the same way?

d. Applying. The greatest chance for people to internalize the learning occurs in the application phase. The goal is to get them to apply the learning to their own "back home" situations, to confer personal meaning to the abstracted learning and to incorporate it into their own behavior.

If the session addressed the trainees' needs and they have participated in all the phases of the training, it should be possible at this stage to gain their commitment to put the learning to use. In doing so, they will complete the cycle by creating their own experience beyond the end of the workshop.

Application Pleas:

Ask each individual:

- How will you. . .when you get back?
- By (Monday, next week, etc.), what will you have done as a result of the workshop?

Finally, the trainer can ask participants to phone or write about their applications of the learning, or plan a reunion.

Implementation Evaluation Questions:

1. Did I instruct small groups clearly and completely?
2. Did the experience provide for sufficent interaction?
3. Were all participants drawn into the activities and discussions?
4. Was processing complete for everyone before I moved into the generalizing phase?
5. Are the participants clear about what was learned?
6. Did I gain an unequivocal commitment from each participant to put the learning into practice?

IV. Closure. The three main functions of the closing phase are to review the session to check that the goals were attained, to make a formal evaluation (e.g., a feedback form) and to provide a linkage to a possible next session.

If nothing else, it's important to your credibility as a trainer and to the group learning process, to display and review the session learning goals. Check whether the participants agree that the learning objectives have been met. You may need to include any incomplete ones in a follow-up session.

Closure Evaluation Questions:

1. Have I left any loose ends dangling?
2. Did I remember to check for goal attainment?
3. Did I show how this session fits within the overall training scheme?
4. Did everyone complete an evaluation questionnaire?
5. Did my worst fears materialize?

DISCOVERING EDUCATION: SINGLE AGENCY MODULE #1

GOAL: To expand awareness of how and where learning can occur in the organization.

OBJECTIVES:

1. Discover where official training and nonformal learning occurs in the organization.
2. Use the Lifelong Learning Scale to profile existing organizational learning characteristics.
3. Examine the strengths and needs of the organization towards increased learning opportunities.

AUDIENCE: Up to five or six representatives each of different departments or divisions. Ideal maximum size for a single trainer is 15 - 20 (four groups).

TIME REQUIRED: 2½ - 3 hours

PHYSICAL SETTING: Adequate space for groups to work independently.

MATERIALS:
Newsprint and markers
Short versions of Lifelong Learning Scale
Formal and Nonformal Worksheets sufficient for each participant

WORKING WITH PARTICIPANTS: IMPLEMENTATION OF ACTIVITIES

TRAINING CHECKPOINTS	TIME IN MINS.	ACTIVITY	PURPOSE	MATERIALS	NOTES
CLIMATE SETTING		1. Introductory or Ice-breaking Exercise. (Appendix)	Establish atmosphere.		Establish time.
	15	2. Needs Assessment. Brainstorm list on newsprint of all individuals and groups in the organization that provide opportunities for learning.	Gather specific data from trainees. Introduce topic.	Newsprint, markers, tape	Write boldly groups will use lists later.
GOAL SHARING	5	3. Goals and Objectives on newsprint. (Copy from session goals.)	Establish relevance of training.	Prepared newsprint	Relate to group needs list.
GROUP INSTRUCTIONS	20	4. Group Work. Break into groups of no more than 5 - 6 representing each department or division. Have participants expand the brainstormed list by categorizing what they learned and where (in the organization) under "FORMAL" and "NONFORMAL" columns on worksheets. Have groups pick reporters to record on newsprint a group list of learning and sources.	Expand awareness of sources and nature of learnings.	Worksheets, newsprint, markers for each group	Give examples of "FORMAL" training and "NONFORMAL" scuttlebutt.
	10	Report Out. Reporters display newspring lists and read to whole group. Trainers encourage discussion, leading to new items for individual lists.			
	10	5. Lifelong Learning Scale Introduction. Pass out copies of Scale. Short talk based on "Description of the Scale." Demonstrate use of scale with "objectives" variable.		Short Scale, "objectives" on newsprint	
EXPERIENCE	15	6. Individual Profiling. Individuals apply scale to their departments or divisions as they see them now. Profile by connecting each letter.	Generate data.		The central experience.
GROUP INSTRUCTIONS		7. Group Sharing. In same groups, participants share findings. Reporters to make notes on: a. Areas of least agreement b. Areas of most congruence c. Prepare a report on the group "consensus" about the learning characteristics of the unit they represent	Share findings with others in small group.		
	10	Report Out. Reporters share data with the whole group.	Share in large group.		Keep them brief.
PROCESS	15-30	8. Discussion. a. What's different/similar about learning characteristics of the departments/divisions? b. What are the consequences, etc.? c. Is learning encouraged in the organization? How? d. Would other departments (not represented) agree? e. What conclusions can be drawn from the Lifelong Leaning Scale analysis?	Compare/ contrast.		Record as much data as possible on newsprint
GENERALIZE			What was learned?		
APPLY	10-15	9. Brainstorm. a. A list of strengths/needs of the organization relating to increasing learning opportunities for members b. Actions that would enhance organizational learning capacity	Discover what can be done.	Newsprint	If possible, get commitment from people/ units to take action.
CLOSURE	10	10. Review Goals and evaluate and discuss follow-up.			

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WORKSHEET #1

List some of the most important things you have learned in the organization and indicate where or from whom the learning came.

Formal Training	Nonformal Learning

WORKSHEET #2

SHORT VERSION OF LIFELONG LEARNING SCALE

EDUCATIONAL VARIABLES	DESCRIPTORS More Formal More Structured More Abstract More Objective			Less Formal More Flexible More Concrete More Subjective	N/A; COMMENTS
Objectives	1 2 3 Building and conservation of knowledge More cognitive More delayed			4 5 Applying knowledge for personal and community development More psychological and physical More immediate	
Content And Sequence	1 2 3 Abstract; symbol systems Logically organized Scholarly disciplines Predictable sequence Requirements and prerequisits			4 5 Concrete; experiential Psychologically organized Interdisciplinary Sequence less ordered Few requirements	
Staff	1 2 3 Professionals A major life aim Highly trained Distinct roles Credentials			4 5 Lay oriented Ancillary life aim Short term training Less distinct roles Noncredentialed	
Teaching-Learning Approaches	1 2 3 Teachers more managerial, directive More teacher dominant Learners more passive			4 5 Teachers more facilitating, advising, linking More learner dominant Learners more active	
Power, Control And Administration	1 2 3 More bureaucratic More hierarchial Power partly a function of status and resources Decision-making by role Workers in established organizations Leaders viewed as managers			4 5 More personal More horizontal Power largely function of competency Decistion making shared Workers less organized Leaders viewed as coordinators	

DEFINING ORGANIZATIONAL LEARNING: SINGLE AGENCY MODULE #2

This module is suitable for a follow-up session for Module 1, or it can be modified for use with a smaller, less differentiated organization.

GOAL: To encourage a common view of how the organization operates educationally.

OBJECTIVES:

1. Individuals experience using the Lifelong Learning Scale to analyze the organization's learning characteristics.
2. Explore the reasons for different perceptions of learning within organizations.
3. Draw the group's profile of the organizational learning characteristics.

AUDIENCE: Representatives of as many different operational areas of the organization. Ideal maximum size for a single trainer is 15.

TIME REQUIRED: 2½ - 3 hours

PHYSICAL SETTING: No special arrangements.

MATERIALS: Newsprint and markers
Copies of short scale

A C T I V I T Y:

(Climate Setting)

1. Introductory Exercise as needed (see Appendix).
2. Needs Assessment. Generate a list (on newsprint) of things that can be learned in the organization.

(Goal Sharing)

3. Goals and objectives on newsprint. Read and discuss.
4. Introduce Scale. Explain (or refresh participant's memories) how scale is applied. Pass out copies of short version of scale. Base a short

talk on "Description Of The Scale" and demonstrate (if needed) with the "Objectives" variable.

5. Individuals Apply Scale. Instruct participants to use scale to indicate how they see the organization now. Point out that it may be necessary to circle more than one number to reflect variations between different areas of the organization.

6. Data Collection. List on newsprint the variables which yielded the greatest spread indicated by recording the scale numbers of each participant on each variable.

(Experience)

7. Analysis. Have the group discuss the possible causes of varied perceptions. Compare and contrast different viewpoints.

8. Refining The Profile. Have participants review their findings in the light of the discussion. Participants report numbers selected for each variable. Mark on large newsprint scale. Group chooses "average" number for each variable. On completion of all variables, trainer connects "average" numbers with a line to produce profile.

9. Discussion.

   a. Have participants process the individual scale application and group profile production.

(Process)

   b. Explore the implications of the learning characteristics of the organization, both for the whole group and for the individuals.

(Generalize)

   c. Encourage participants to decide what action might be needed to apply their findings to the organization (i.e., lead into Module #3).

(Apply)

10. Review Goals and connect with possible follow-up session.

(Closure)

PREPARING FOR CHANGE: SINGLE AGENCY MODULE #3

This training module is designed to follow Module #1 or #2, where the organization is ready to plan for change.

GOAL: To prepare for change in the organization's learning function.

OBJECTIVES:

1. Draw the "ideal" profile for the organization.
2. Compare "real" and "ideal" profiles.
3. List actions needed to move from "real" to "ideal."

AUDIENCE: As in either Module #1 or #2.

TIME REQUIRED: 3½ hours (following Module #1); 2½ hours (following Module #2)

PHYSICAL SETTING: As in either Module #1 or #2.

MATERIALS: Newsprint and markers
Copies of short scale

A C T I V I T Y:

(Climate Setting)

1. Introductory Or Warm-Up Exercise, if required.
2. Review the data generated at the end of the previous session. Elicit more items for newsprint list.

(Goal Sharing)

3. Goals And Objectives on newsprint. Discuss.
4. Pass out copies of short scale. Have participants circle the "real" profile numbers and connect with line. (Note: If this session follows Module #1, insert Steps 5 - 7 from Module #2.)
5. Participants mark the scale to indicate how they would like to see the organization operating educationally in five years.

6. Using an enlarged version of the scale on newsprint (marked with the "real" profile), have the participants report their number choices for each variable and choose the "average" number. When complete, connect numbers to create the "ideal" profile.

(Experience)

7. Discussion.

   a. How realistic is the "ideal" profile?

   b. Why the gap between "real" and "ideal?"

   c. Were there any surprises?

(Process)

   d. How do you feel about the results, etc.?

   e. What was learned from the comparision of "real" and "ideal" learning profiles?

(Generalize)

   f. What will the "real" profile look like in a year's time?

8. Brainstorm. List on newsprint the actions necessary to move from the current situation to the "ideal."

(Apply)

9. Review Goals and make the connection to a follow-up planning session, if applicable.

(Closure)

SYNERGY FOR EDUCATIONAL SURVIVAL: CROSS-AGENCY LINKAGE MODULE

GOAL: To set the stage for inter-organizational collaboration towards increased educational opportunity in the community.

OBJECTIVES:

1. Diagnose the learning characteristics of each organization represented by using the Lifelong Learning Scale.
2. Simulate rational collaboration planning based on differing strengths and needs surfaced by the Lifelong Learning Scale data.

AUDIENCE: This module can be used for a group of one or two representatives each from a variety of organizations in a single community (in which case formal education, business and industry, adult education, human service organizations, etc., might be represented). The training can also be targeted to a random sample of education and human service representatives at, for example, a conference workshop. The ideal size of the audience is 10 - 15 participants per trainer.

TIME REQUIRED: 2 - 2½ hours

PHYSICAL SETTING: Adequate for the numbers and flexible enough for groups to work independently.

MATERIALS:
Newsprint and markers
Short version of the Lifelong Learning Scale
Copies of the hypothetical case description and instruction sheet

A C T I V I T Y:

(Climate Setting)

1. Introduction. Participants introduce themselves either individually or in dyads with name, position, agency and (when appropriate) where they are from.

2. Discuss what the name of the session, "Synergy For Educational Survival" means. Note responses on newsprint.

(Goal Sharing)

3. Display and discuss the goals (on newsprint).

4. Short talk on Lifelong Learning. Demonstrate the use of the Lifelong Learning Scale by using the objectives' variable. Pass out copies of the short version of the Scale.

5. Have participants apply the Scale to their own organization by circling the appropriate number on each variable and connecting the numbers to draw the profile. (Pairs or small groups representing a single agency can be encouraged to work together. However, this will slow the proceedings down for other individuals.)

6. Share-Out. Either in the whole group (if less than five organizations or 10 participants) or in groups of five or six, have participants compare results and briefly discuss similarities and divergences in organizational learning characteristics.

7. Simulation Introduction. Pass out the hypothetical case and instruction sheets. Read the case aloud. Clarify, if necessary.

8. Form Groups of up to five, each representing a wide variety of organizations as possible. Participants work on task.

(Group Instructions)

9. Report-Out. Each group reports its solution briefly.

10. Structured Discussion.

a. What was the simulated collaboration like?

(Process)

b. Why were solutions similar/different?

c. Could such a rationalization of education really take place? How?

d. What organizations would need to be present to produce a viable comprehensive community plan? (List on newsprint.)

(Generalize)

e. What do you (individuals and/or group) intend to do about educational collaboration? (List on newsprint.)

(Apply)

f. What is the next step? Who will do what?

g. Review Goals and link to possible follow-up action.

(Closing)

h. Evaluation. Solicit comments or hand out an evaluation form.

HANDOUT

SYNERGY FOR SURVIVAL: A HYPOTHETICAL COLLABORATION

You all work in the same small city. The Mayor has called you together to inform you that:

1. As a direct result of unprecedented collaboration between G.A.O., H.E.W. and the Department of Labor, all Federal educational, training and human service activities are to be funded from a single block grant. (In addition, I.R.S. recently ruled out the cost of job-related training as a deductable expense for individuals and as a cost of doing business for industry and commerce!)

2. The Mayor's Office will from now on dispense all funding in the education and human services block.

3. His staff estimates that the funding available will be at least 30% less next year compared with the total combined budget your organizations will spend this year.

4. He requests that you assist him and, by working together, prepare for his consideration a Comprehensive Human Services, Education and Training Plan. The plan should be aimed at reducing costs and eliminating duplication of services.

Instructions

You have 30 minutes to:

1. Pick a recorder for your group

2. Create a rough plan

3. Be prepared to describe your plan briefly to the other groups

A DIFFERENTIATION APPROACH:
INTER-AGENCY CONFLICT MANAGEMENT MODULE

GOAL: To dispel misperceptions between organizations that have educational functions and to identify real differences in a constructive manner.

OBJECTIVES:

1. Clarify, by using the Lifelong Learning Scale, how each organization views the educational functioning of the other(s).
2. Allow each organization to react to differences between how it sees itself and how others perceive it.

AUDIENCE: Between two and five key members of two or three organizations which are experiencing difficulty in collaborating on educational goals and/or delivery. (More groups can participate, but the impact is greatest when two conflicting organizations participate.)

Examples:

- Teacher's Union
- Schoolboard
- Adult Education
- K - 12 teachers
- University faculty
- Industrial trainers
- Human Service agency
- Etc.

TIME REQUIRED: 3 - 4 hours

PHYSICAL SETTING: Separate rooms for each organization and a meeting room large enough to seat the whole group.

MATERIALS: Newsprint and markers
Two or three different colored crayons for each group
Copies of the short version of the Lifelong Learning Scale for each participant

A C T I V I T Y:

(Climate Setting)

1. Introductions. Limit introductions to name, title and organization represented. (Note that in the case of severe conflict, an early attempt to establish a cordial atmosphere may be futile or even counter-productive).

(Goal Sharing)

2. Display and discuss goals briefly.

3. Distribute Lifelong Learning Scale sheets.

4. Short Talk. Base a short discussion on "A Description Of The Scale" and demonstrate the Scale's use with the "Objectives" variable.

5. Have participants apply the scale to their own organization. Discourage discussion.

6. Place each group of organizational representatives in a private room, provide each with a "neutral" trainer.

7. Have each group reach a consensus on how their organization really fits on the scale and draw an organizational profile with a colored crayon.

8. The group's next task is to analyze the other groups' educational characteristics and draw a profile in a contrasting color on the same sheet.

9. Based on the Lifelong Learning Scale analysis, have the group:

   a. Identify variables on which the agencies are most different and similar

   b. Choose words or short phrases which describe their own organization's greatest educational strength and weaknesses

   c. Choose a short description of the other organization's major strengths and weaknesses

   The trainer takes notes on newsprint and checks with the group for accuracy.

(Experience)

10. Confrontation. Reconvene the whole group in the meeting room. Each trainer reports on a, b and c, above.

11. Structured Discussion.

a. How does. . .organization feel about the analysis (analyses) made of them? (Ask each group.)

b. Why does. . .think your organization is. . .? (each group).

(Process)

c. What have the consequences been of the different views?

d. What new things did you learn about your own/other organizations?

e. Do you think that your organizational clients (learners, participants) share similar ideas on the differences between your organizations?

(Generalize)

f. Are the differences really weaknesses or could they be seen as strengths?

(Apply)

g. In the light of this new knowledge, what does each organization plan to do to work more closely with the other(s)?

12. Review the Goals and Activities, repeat the major discoveries and remind participants of any action commitments made.

(Closure)

13. Evaluation. Observation may provide the best evaluation of the workshop - especially if it has succeeded in reducing the barriers between the organizations.

NOTE: Ideally, the workshop should end ahead of schedule to allow informal discussion to take place.

TEACHING-LEARNING MODULE ON LIFELONG LEARNING

Instructors for community and adult/continuing education programs or workshops can adapt this module to provide either a brief, or indepth, experience concerning out-of-school (nonformal) education.

GOAL: To analyze the concept of education when it is described as any organized, intentional, overt effort to influence people; and when education is seen as a potential system of community based agencies or groups.

OBJECTIVES:

1. To introduce learners to the concept of nonformal education (or out-of-school education)
2. To help learners analyze the educational functioning of out-of-school agencies and organizations
3. To provide a procedure for learners to construct a formal-nonformal profile of the educational functioning of an agency
4. To demonstrate that the educational profiles of agencies may be a varied mix of formal and nonformal
5. To explore similarities and differences between schooling and many nonformal education groups

AUDIENCE: Learners in community and adult/continuing education courses, workshops, and programs: undergraduate and graduate students, staffs of programs, school board and program board members, etc.

TIME REQUIRED: 1½ hours or much more, depending on the objectives and activities selected

PHYSICAL SETTING: Any appropriate space.

MATERIALS:
Copies of the Lifelong Learning Manual or of the full or short version of the Scale
Newsprint
Sample case(s) of a nonformal agency, or agency resource person, or learner's own cases

ACTIVITIES:

Use of the Scale Descriptor Explication section of the Manual is especially helpful. After an introduction to the Lifelong Learning Scale, learners read a case description of the educational functioning of an out-of-school agency or group. This case description can be prepared by the instructor. Or the instructor can have a staff member of an agency come to the class or workshop as a resource person and describe the agency and its educational functioning. A third alternative is to select a type of agency or group or institution that most of the learners are likely to be familiar with and use that as the case.

Each learner then draws a profile of the agency using the 11 variables of the Lifelong Learning Scale. In pairs or small groups, learners share, compare and discuss their profiles. Differences in learners' perceptions of the same agency (or case) helps point out the complexity of educational functioning in an agency, and the likelihood that there may be some variations among learners' judgments and interpretations about the use of the Scale when applied to a specific case.

Each learner (or pair) can then be asked to select a non-school agency that has a significant educational function. This selection may be from the area of the university or workshop site, or any other area that is accessible to the learners. Using a simple interview process with the appropriate person of each selected agency, each learner asks and records answers to questions concerning the ways the agency operates relevant to the 11 variables of the Lifelong Learning Scale.

At a following learner session, comparisons are made among the learners concerning their experience. Similarities and differences that characterize community-based agencies in their educational functioning can be explored. Possible additional learning activities can be developed by the instructor, using modifications and adaptations of parts of the other modules in the Lifelong Learning Manual.

RESEARCH ON LIFELONG LEARNING MODULE

The Lifelong Learning Module can be used for research purposes when there is an interest in investigating such issues as:

1. Providing specific and detailed data concerning the educational elements of an agency (or institution or organization)
2. Providing explicit information as to the educational objectives of an agency
3. Providing explicit information as to the levels and types of structures of an agency's functioning
4. Providing explicit information as to the formal-nonformal nature of the educational processes of an agency

GOAL: To encourage use of the Lifelong Learning Scale for research purposes.

OBJECTIVES: To suggest ways to adapt the Scale, tailored to specific purposes of a given research design.

AUDIENCE:

1. Professional staff and students in University Community Education and Adult/Continuing Education Centers
2. Professional staff of private and government Community/Adult Education Centers
3. Professional staff of Community/Adult Education delivery programs

TIME REQUIRED: Variable

PHYSICAL SETTING: No specific arrangements.

MATERIALS: Copies of the Lifelong Learning Manual.

ACTIVITIES: Starting with the basic Lifelong Learning Scale with its 11 variables and their descriptors, determine any modifications needed in the Scale to meet the specific purposes of the research. Use of the Scale Descriptor Explication section of the Manual is important.

1. Make additions to the Scale's variables. Examples are: externally controlled governance or self-governed; programs more isolated from social-economic environment of society or closely imbedded in the community; credit (and degree-related) or non-credit (and non-degree) related; age-specific, or age-inclusive; etc.

2. Consider whether any given variable of the Scale should be broken down into more specific factors. An example is: for the variable of content and sequence, establish specific focus on separate factors of abstractness, of sequence, of pre-requisites, of types of content messages, etc.

3. Develop appropriate descriptors for each continuum of any additional variables and factors of major variables.

4. Pilot-test the modified Scale to check on clarity of new descriptors.

(The Authors would appreciate information about ways in which the Scale or modified versions have been used for research purposes.)

SCALE DESCRIPTOR EXPLICATION

OBJECTIVES

More formal. The central objective of most formal educational organizations is to transmit the knowledge base of the culture and to prepare selected learners to develop new knowledge. Formal schools emphasize cognitive learning much more than the acquisition of physical or affective learnings. Learners concentrate on learning symbol systems, understanding general principles and theories, classifying information, logical thinking, and systematic problem solving. On a typical day, for instance, a junior high school student will be studying grammar in English, learning theorems in Geometry, classifying animals into their respective phyla in Science and analyzing the effect of river valleys on colonial settlements in Social Studies.

Formal schools do have many other objectives; vocational preparation, physical fitness, citizenship training, and moral development are examples. However, in so far as any specific school places major emphasis on these objectives at the expense of transmitting or building abstract knowledge, that school becomes less formal in its objectives. In making this judgment, it is important to note not just the stated objectives which often are less formal, but actual objectives which often are more formal.

The emphasis on cognitive knowledge and the building of new knowledge has implications for time span required to attain the objectives. Symbol systems take time to master, logical thinking takes not only practice but, according to Piaget, physical maturity as well. Usually, mastery involves breaking each skill down into small sub-objectives, which because of their minuteness, are often not perceived as meaningful or exciting by the learner. That is, the objectives may be more extrinsic to the learner, the objectives are needs as seen by others; not by the learner.

The long time span required to attain formal objectives and the stress on extrinsic motivation has had its effect on both the scope and sequence of the typical curriculum. Subject matter is divided into academic disciplines, and often into sub-disciplines, to facilitate mastery of the required skills and concepts. The emphasis is not on understanding the topic in its entirety, but in preparing for the next level of schooling which will treat the topic in more depth.

The learning of logically-organized knowledge often becomes an objective in itself (knowledge for knowledge's sake); knowledge is seen as an expression of one of the outstanding qualities of what it means to be human.

Less formal. Less formal educational approaches tend to emphasize the application of knowledge to personal and community needs, rather than the transmission or creation of knowledge. Personal needs might include food, shelter, recreation and family relations; community needs might be for economic development, water supply, transportation, land reform, and sanitation.

These objectives are more inclusive than those that characterize formal schools. The acquisition of food and the creation of strong supportive families involve physical and psychological processes as well as cognitive understanding. Broad life experiences are valued and the cognitive, affective and physical components of these experiences are often so intertwined as to be difficult to separate. Often, objectives are left vague, the assumption being that whatever emerges from the experience will be desirable or acceptable.

Also, the objectives are usually more immediately attainable than those emphasized in a formal school. A participant can learn about a new variety of seed or employment opportunity; a community can develop a plan for reducing ethnic tensions. Both this immediacy of attainment and the inclusion of physical and psychological functions have the result of making the objective seem more meaningful to the learners, that is, the motivation may be more intrinsic. The learner sees the objective as meeting his/her needs, not just the needs as seen by others.

CONTENT AND SEQUENCE

More formal. The nature of the objectives of formal systems, the acquisiton and building of knowledge, has its effect on the choice, the organization and the sequencing of content. The issue of what content to cover and what to leave out is an important issue for formal settings. Because all abstract knowledge may be potentially valuable, and because acquiring knowledge may be a good in itself, there are difficult decisions as to what knowledge should be learned; inevitably there is much more to know than there is time to learn. In formal schools the decision about content choice is generally made by an authority, because the authority is thought to have more knowledge of the field and thus is better equipped to make the decision.

Content in the formal system is organized into scholarly disciplines or sub-disciplines in order to allow potential researchers to narrow their focus sufficiently to master the field and begin to build new knowledge. Often, each discipline includes its own symbol system, the mastery of which is a significant part of the formal content.

The major power of this organization of knowledge lies in the theories that can be constructed in the various disciplines, and the possibility these theories hold for establishing relationships enhancing predictions and providing satisfying explanations. Yet, the theory levels of content may not be understandable to learners without detailed facts. The necessary connections of facts and theories provides another indicator of formal contents' characteristics: continual attention to the balance between "forest and trees," between generalizations and details.

Sequencing of knowledge is a logical outgrowth of the emphasis on knowledge building. Content is usually arranged to fit age-grade levels, and prerequisites are often a feature of the curriculum. Knowledge tends to be separated into specialized segments favoring learning in depth of logically distinct areas. The spiral concept of the curriculum repeating topics at ever increasing levels (U.S. History at the 5th, 8th and 11th grade) is common.

Less formal. The purpose of less formal approaches tends to emphasize the application of knowledge to personal situations. This emphasis has an implication for the choice, organization and sequencing of appropriate content. Application is a much more learner-dependent activity. Consequently, decisions about content tend to be made with considerable learner involvement. Content is usually chosen to provide information that is highly practical with an emphasis more on how information works rather than why it works (the theory level). Thus, the knowledge tends to be specific and concrete, closer to the sensory, experiential levels.

Since content is selected to address more immediate life functions of persons and communities, it is organized more on physical-emotional grounds, the wants and needs of the learners in specific situations. The focus on immediate life needs increases the likelihood that knowledge will have to be selected from several varied disciplines, which again is characteristic of the psychological or subjective basis for content selection. In addition, since there is less necessity to learn the intricacies of the various knowledge symbol systems in order to use the knowledge, the content tends to require less emphasis on form and more on message.

Logical, step-by-step sequencing of content is usually not a necessity in less formal systems. Since choice is based more on immediate holistic bases and content is more usually interdisciplinary, the order of learning is rarely important. For the same reasons, much less is assumed as to what previous learnings have been acquired by the learner.

TIME UNITS

More formal. Learning experiences are organized into large time segments, such as a year or a semester or a quarter. Most learners are involved on a full-time basis. The learning experiences (usually referred to as the subject matter of courses) meet at specific times as regards hours and days, with a complicated schedule of offerings. This schedule permits high predictability as to what is to be offered any time during a semester or year. Major changes in the schedule are difficult to arrange.

Less formal. The learning experiences are short-term, often an hour or two, or a few days to a week. The learners are involved in other full-time affairs, and are learnes only on a short or part-time basis. Scheduling is not complicated, and it is relatively easy to alter the schedule of learning experiences.

LEARNERS

More formal. One of the characteristics of learners in a more formal, more highly structured situation is that they tend to be separated by ages. For youth, these categories are quite precise, seldom varying by more than a year; for adults, the age limits are somewhat more flexible but still very noticeable. When a retired person receives a B.A., it is generally the subject of some discussion in the newspapers. University education is seen as largely applicable for older adolescents.

Similarly, the selection process for formal schools is more highly structured. Each level of schooling has precise, predictable selection criteria: mandatory attendance for younger age groups; selective admission by school achievement for others; mandatory attendance because of occupation for other groups. At upper levels of schooling, these criteria can also result, intended or not, in ethnic and social class distinctions.

Less formal. In contrast, less formal situations include persons of widely varying ages. Grouping tends to be by self-selection, expressed interest, skill level or similar criteria. "Family" groupings of people of all ages would be a frequent occurence. Selection criteria include other general physical and psychological chracteristics as well as the cognitive criteria of the formal system. Thus, one critera might be occupation, another interest, another might be propinquity. The more general category of self-selection is a frequent element which contributes to the unpredictability of attendance patterns.

STAFF

More formal. Most staff members working in a more formal system tend to think of themselves as professionals and to have completed lengthy training programs leading to the proper credential. As a result, staff members consider their positions as major life aims. Because the training programs themselves are precise and selective, the staff members tend to be limited to a distinct role and often to a specific age group as well. A skilled 10 year old skier could not coach skiing at a university, nor is it likely that a staff member with a doctorate in science would be a classroom aide in the reading resource room. A person with a B.A. in English and a secondary teaching credential is most likely to be found teaching secondary English within the formal system. Staff are tied to a highly organized personnel process of pay scales, hiring and firing, tenure and fringe benefits.

Less formal. That same person, however, might be found in a widely varying set of positions in a less formal system. Equally frequent are the inclusion of staff members with little formal education, no credentials, and whose major occupation is only peripherally related to the program. Generally, in a less structured situation, at most only a small

percentage of the staff are professionals with the vast majority having less sustained training backgrounds. Staff training for nonformal approaches tends to be short-term and situation-specific with the purpose of enabling the person to perform concrete tasks rather than to provide the person with a credential that is transferable to different situations. With a series of short-term training sessions and with no credential requirements, a staff member can perform a number of roles. Personnel issues are generally uncomplicated, readily negotiated.

TEACHING-LEARNING APPROACHES

More formal. The task of learning large quantities of content favors approaches that permit maximum coverage in the shortest possible time spans. Messages can be most rapidly conveyed when the teacher is in control of the flow of information. Lectures, speeches, telling, as well as assigned readings are relevant approaches. The software of the teaching machine approach, and of radio and television, are also readily adaptable to formal content demands.

Content that deals with the learning of symbol systems (mathematics, language, spelling, vocabulary, grammer are examples) may favor memory, repetition, rote teaching-learning approaches. This is also the case where large numbers of facts are to be learned. Listening, speaking and seeing tend to be the major sensory requirements of formal approaches.

Clues to formal teaching-learning approaches are provided by observing high teacher management, direction, and control over the procedural decisions, and minimal student overt motor and psychological activity. Some variation in approaches may be observed as a function of subject matter (i.e., physical education, lab sciences, and studio arts content) will generally be less formal in their teaching-learning approaches.

Less formal. The emphasis on application of knowledge to personal and community development tends to favor interactions between teacher and learners, and among learners. These interactions are manifested through cognitive, psychological and motor learnings. Typical approaches are discussions, workshops, experientially-based techniques, group projects, games, simulations, role playing, apprenticeships, internships. Utilizing such approaches requires much more time than formal ones and it is usual for quantity of content to be sacrificed.

One evidence of nonformal approaches is gained through observing the heightened overt activity of the learners, and the shared decision making concerning which approaches to use, between teacher and learners. The teacher's approach is one of facilitating, advising and linking.

REWARDS AND EVALUATION

More formal. Generally, that which is evaluated in a formal situation is a gain in cognitive achievement. That gain is usually measured as a product; what the learner knows is the ultimate criteria for success. Less emphasis is placed on assessing the process or components of that learning.

The measurement of learning is a highly developed process. Considerable care is put into attaining high levels of reliability and validity. Generally, the results are expressed in quantitative terms as a means of attempting to achieve accuracy. The emphasis on mathematical measurement often means that the objectives of the program must be ones that can be measured mathematically.

The results of this quantitative process are usually expressed in terms of scores, which in turn become marks or grades. The grades accumulate to become credits, credentials and degrees. These symbols for learning often become a major motivation for learning. For many, this type of motivation is largely extrinsic. Fear of failure in other peoples' eyes rather than a desire for the learning itself becomes the driving force.

Often, the standard for interpreting these scores are external standards set by a recognized authority (100% on a Spanish exam) or a score set by comparison of each learner to others in the learning group (a "500" score on the S.A.T.). The emphasis on comparision gives rise to the competitive characteristic of formal evaluation, and may be an additional powerful motivating force.

Less formal. Less formal approaches emphasize not just the product of learning (the learner's gains) but also the degree to which the planned components of a learning situation were actually carried out. The process of learning is as important as the product. If the objective of the learning setting is stated in terms of group or community development, the emphasis in assessment will be on the results of that collective learning, not on what any one individual knows.

Less emphasis is placed on quantitative assessment techniques. Instead, qualitative techniques are seen as necessary given the complex purposes which include an interaction among cognitive, psychological and motor objectives. There may be considerable subjectivity in these evaluations, and confidence in their accuracy is correspondingly lower.

The more practical and immediate characteristics of nonformal objectives leads to standards derived from individual rather than competitive sources. Learner gains are gauged by comparing the learners past achievements with the person's current ones. Competition is on the application of the total group learning to an immediate problem, rather than the long-term development of scholars or theoreticians.

MATERIALS AND RESOURCES

More formal. Equipment used in the teaching-learning process is extensive, costly, high in technology, and commercially mass-produced. Sophisticated audio-visual materials and laboratory materials are available, involving complicated equipment. Reading materials in the form of carefully edited texts and workbooks are available, produced by large publishing firms. Extensive reference libraries are available.

Less formal. Teaching-learning resources and materials are frequently produced at the local level, by the immediate staff, directed at specific time-space-bound learning objectives. They tend to be inexpensive, low in technology, produced in small numbers. The resource indigenous to the life function settings at home, field and community small enterprises often provide learning materials and equipment.

FINANCIAL RESOURCES

More formal. Formal schools tend to operate with a high fixed overhead, a result of the expense of a professional staff, reliance on commercial resources and a heavy investment in buildings. Thus, the expenditure per learner is relatively high, for the most part too high to be financed by private sources. Formal organizations must therefore rely heavily on government financing. As a result, schools must have quite elaborate accounting procedures to satisfy their funding agencies and have less flexibility in allocating the funds they receive. There is a sense of permanency, of long-term investment.

Less formal. Less formal organizations employ fewer professional staff members, rely heavily on teacher and learner-prepared resources, and seldom require separate facilities for their activities. Their fixed expenses are thus lower and it is more possible to seek funds from both private and governmental sources. Generally, the smaller amounts of money and the less bureaucratic sources of that money result in less elaborate bookkeeping procedures and few restrictions on the particular use of the funds. Thus, it may be easier for a nonformal agency to make major changes or to close down its operations.

BUILDING RESOURCES

More formal. Formal schools usually are housed in large permanent structures constructed by professionals and requiring high levels of maintenance. Once the building is constructed, the spaces available for education are specific and somewhat restricted in their use. The typical institution with rows of classrooms and long corridors is an example.

Less formal. Less fomral education takes place in a wider variety of settings. Classes and workshops can appropriately meet in a participant's home, on a field site, in an unused community room, or in a local school. The setting is more a function of the objective and of the participant's desires. For this reason, less formal organizations seldom require separate buildings, or if they do, the construction is less elaborate and can often be done by the participants. Low maintenance and lower costs are a result.

POWER, CONTROL AND ADMINISTRATION

More formal. Formal schools are for the most part bureaucracies, that is, they have hierarchical patterns of control and supervision, more impersonal procedures and clearly defined roles and tasks. Leaders in the middle and upper level of the hierarchy are termed managers because their role is to set the task, organize the procedures for accomplishing the task and supervise and evaluate the process as it occurs. While some of the power that managers exercise comes from their own competencies, an important part comes from the fact that their position grants them decision making authority and control over important resources. Generally, decisions in bureaucracies are made by upper level managers with more or less participation by other staff members. Because workers are excluded from leadership and decision making, they frequently find it necessary to organize into adversary units in order to make the organization respond to their needs.

Less formal. Less formal organizations, on the other hand, tend to be more personal and more participatory. Power tends to derive from the personal competency of the leaders and in mature organizations will be more diffused. Since roles and tasks are less distinctly defined and categorized, the organization resembles an horizontal overlapping of work groups rather than a pyramidical ordering of people and tasks. For this reason, leaders are better defined as coordinators rather than managers. Their function is to see that groups work together to accomplish an overall task, not to make decisions for, supervise or judge the work of individual units. Decision making tends to be by consensus, that is, all members must be willing to go along with the decision. Decisions are passed up to, not down from, the leader. The results of this inclusion in the leadership and decision making processes of the organization is that workers less often organize themselves into adversary groups like unions and management.

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APPENDIX A.

INTRODUCTORY AND WARM-UP EXERCISES

Dyad Introductions

This method of introduction allows people to talk about themselves, get to know another participant, and hear a little about all the others. It saves time by equalizing the "air time" for introductions.

Ask participants to pair off with someone they either don't know or know least well. Ask each member to interview their partner for three minutes and write down the name, occupation and organization represented. Additional data could include: where they are from, their expectations of training, hobbies, family information and so on. Call time at three minutes and switch roles for a another three minutes. Each person then introduces their partner to the whole group.

Semaphore

This activity helps group members learn each others' names quickly and to focus on people rather than the surroundings. It is a stimulating activity that sets a friendly tone.

The first person breaks their name into syllables and makes a hand sign for each syllable (e.g., thumbs-up, salute, okay!, fingers crossed, etc.). The next one repeats the first one's name and sign and "semaphones" their own. Continue in a circle, adding a new name to the lengthening list. The round is complete when the first member has semaphored the names of the whole group. Make another round - a bit faster and end with a whole-group recitation in unison of everyone's semaphored name.

Other Exercises

See Schmuck, Richard et. al. The Second Handbook Of Organization Development In Schools. Palo Alto, Calif.: Mayfield Publishing Company, 1977.

This has a rich variety of useful ideas for introductory exercises, as well as for other phases of training.